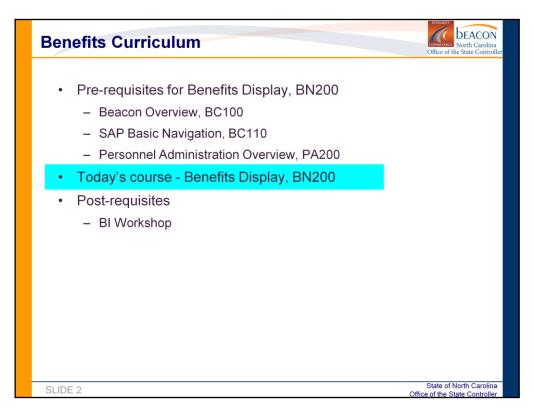


Welcome to the *BEACON SAP Benefits Display, BN200* training course.

Notes:



This slide lists the three pre-requisites you must take before attending this class. Attending these pre-requisites ensures that you are adequately prepared to learn the new processes, concepts, terms, and data display skills covered in this course.

This course is for those individuals working at state agencies, departments, and BEST Shared Services who have been granted authorization to display benefits information for individual employees.

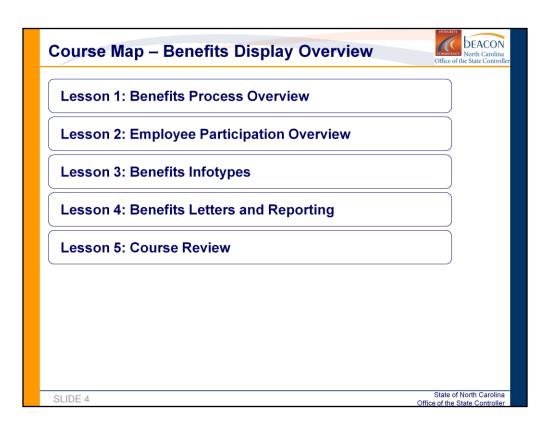
Notes:



The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

Notes:



Course Objectives



Upon completion of this course, you will be able to:

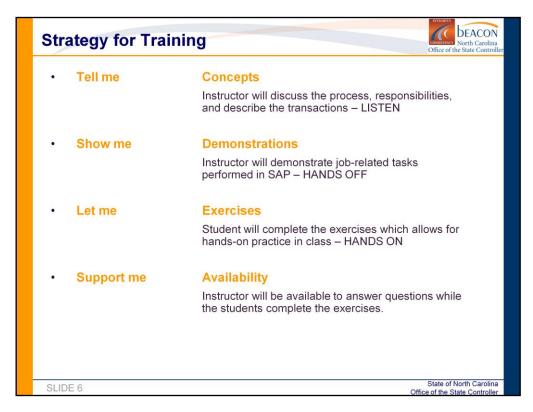
- Describe the benefits enrollment and plan administration processes
- List the tasks performed by Agency HR and BEST Shared Services for benefits administration
- Search for an employee and view available benefit infotypes on the employee's record using transaction code PA20 and a summary overview using HRBEN0006
- Explain the purpose of adjustment reasons
- Display information about the benefits of individual employees using the Participation Overview
- Display benefits confirmation forms and letters

SLIDE 5

State of North Carolina Office of the State Controller

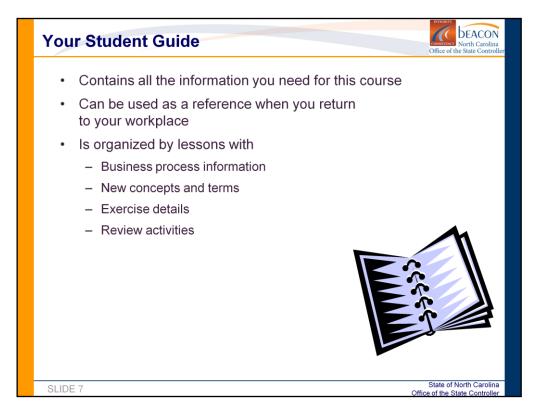
This course explains how to display employee benefits information online using benefits infotypes and the Participation Overview transaction. The course will also cover how to print confirmation forms and run benefit reports necessary to your role.

Notes:



The Benefits Display Overview student guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to take notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment (Sandbox).

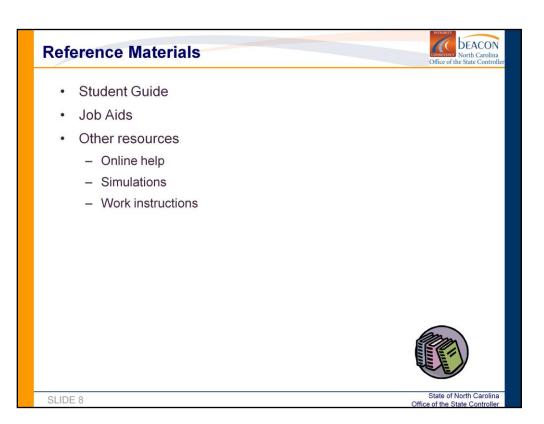
All of the references, job aids, and simulations that are used in this class are available on BEACON University. For the most up-to-date versions, you should always use the materials on the BEACON University website.

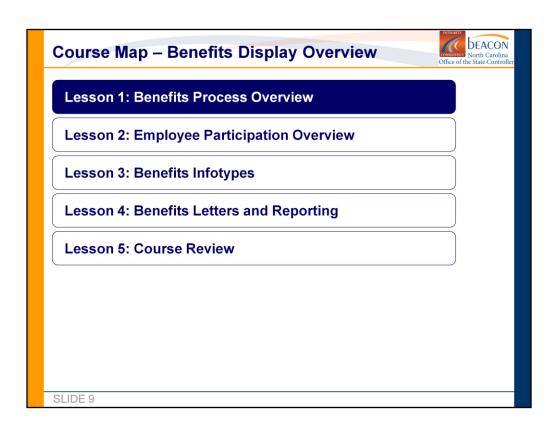


Your student guide is written in an outline style. It is not designed to be read verbatim but rather used as a guide. It contains background information and review activities. The exercise information including:

- Scenarios
- SAP menu paths and T-codes (transaction codes)
- Data to enter
- Reference to the online help

Notes:





Lesson 1 Objectives



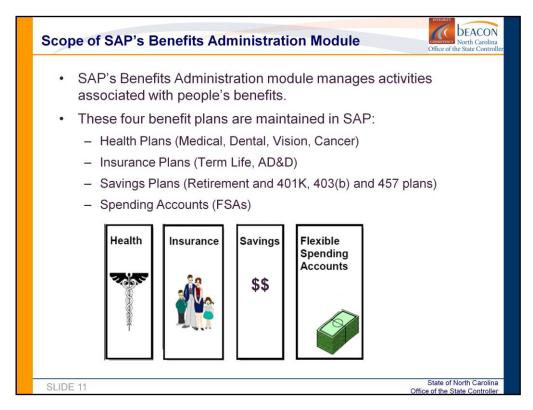
Upon completion of this lesson, you should be able to:

- · Identify the policies the system will enforced
- Describe the roles and responsibilities of key personnel
- · Explain the benefits business processes
 - Annual Enrollment for NC Flex and SHP (State Health Plan)
 - Adjustment Reasons
 - New Hire enrollment
 - Leaves of Absences (LOA)
 - Savings Plans Enrollment
 - Life Changing Events
 - Retirement Plans
 - Benefits Termination
- Explain how SAP determines which benefits to offer an employee

SLIDE 10

State of North Carolina Office of the State Controller

Notes:



With the implementation of SAP, Benefit Administrators and employees now have a streamlined benefit enrollment and management process. Additionally, the process to manage benefit deductions becomes more accurate and timely. This slide outlines which plans are maintained in SAP's Benefits Administration module.

Notes:

Benefit Plan Changes that are Enforced



- NC Flex Plans
 - Start date is the first of the month following the qualifying event
 - Life insurance cost is calculated on the age of the employee as of January 1st
 - FSA plan contributions will not have a monthly limit but will have a yearly limit
- State Health Plan
 - Standardized coverage end date

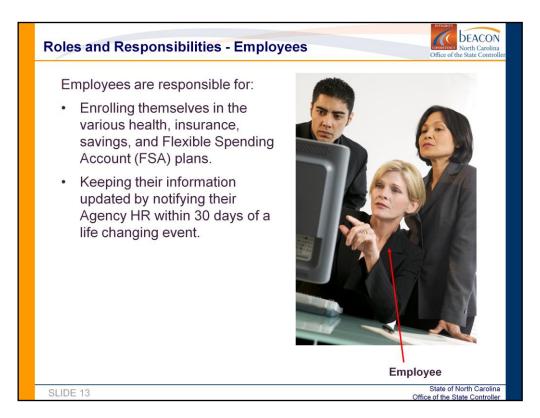
SLIDE 12

State of North Carolina Office of the State Controller

Key benefits of business SAP processing are:

- The standardization of business processes, policies, and procedures across agencies and departments
- Real time access to data
- Streamlined enrollment process
- Streamlined tracking, reporting, and printing capabilities
- Improved exchange of employee data with vendors
- Increased data integrity resulting from centralization of transactional duties
- More efficient processing of employee changes to or termination of benefits
- A list of streamlined action and action reason codes to improve reporting capabilities

Notes:



NOTE: As presented in prerequisite courses, an Employee Self Service (ESS) web portal provides employees online access to maintain personal information in the BEACON HR/Payroll system. ESS allows employees to access their benefits information online and make changes online during enrollment periods.

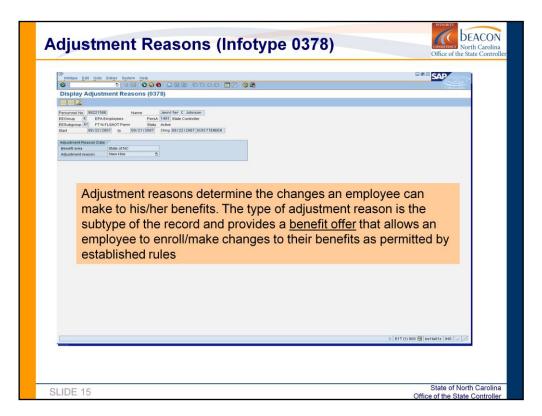
Notes:



The Display Benefits role is held by selected positions in HR Agency/Department and the Office of Personnel.

The Agency HR must create adjustment reasons for "Life Changing Events", for example, marriage.

Notes:



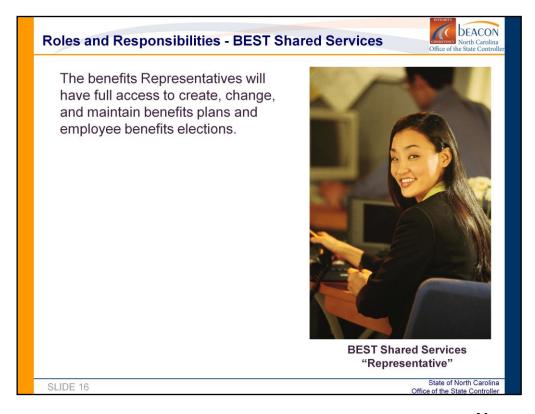
Adjustment reasons

Adjustment reasons explain why benefits elections are being created or changed outside of open enrollment periods. The validity of this record represents the period within which the employee can make changes to benefit elections. Thus when an employee has one of these infotype records, the system produces a benefit offer in enrollment that is valid for the validity period of this record. The benefit offer allows a restricted set of changes to existing enrollments. The adjustment reasons configured in SAP are in accordance with the State's benefits policies. Examples of Adjustment reasons include:

- New hire
- Marriage
- Divorce
- New birth
- No longer a student

Refer to the adjustment reasons job aid for a complete list of reasons.

Notes:



This role is responsible for overseeing benefit processing. More specifically this role has enhanced reporting capabilities. When necessary, the role completes data entry of benefit enrollment information, prints enrollment and confirmation forms, and enters appropriate adjustment reasons into the system. The role also processes LOAs and benefit terminations.

NOTE: As presented in prerequisite courses, you learned that the BEACON Enterprise Support Team (BEST) Shared Services Center centralizes data entry and transaction-based activities including NC Flex, State Health Plan, Retirement Plan, and Savings Plan data entry activities. Agency-specific supplemental plans are the responsibility of the agency.

Key Processes – Annual Enrollment



- Employees will be able to use Employee Self Service (ESS) to complete benefits enrollment online.
- The Benefits Administrator (BEST Shared Services) will enroll employees that do not have access to ESS using paper enrollment forms.
- When the Benefits Administrator enrolls an employee or the employee uses ESS to enroll, the deductions will automatically be taken from their paychecks.
- System interfaces with vendors will replace paper forms providing enrollment data.

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Office of the State Controller

Notes:

NC / SHP Flex Annual Enrollment Period



- NC Flex Annual Enrollment Period
 - Usually occurs in the Fall
- SHP Annual Enrollment Period
 - Usually occurs in the Spring
 - NC SmartChoice Blue Options PO plans
- All employees eligible for SHP benefits are required to enroll if the employee wants coverage.
- The appropriate Adjustment Reason is created by BEST Shared Services for all eligible employees.

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State of North Carolina ice of the State Controller

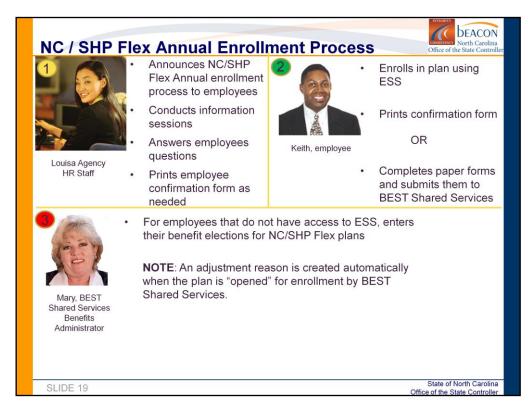
Flexible Benefits Program: NC Flex

NC Flex, the statewide flexible benefits program, offers the employee the advantage of paying for certain benefits with pre-tax dollars. This saves employees money and allows their paycheck to stretch a little further. Many state employees are benefiting from pre-tax programs on health insurance premiums and dependent care costs, but NC Flex expands the savings even further through spending accounts, a statewide dental program, and accidental death and dismemberment insurance. There is also a voluntary vision plan available to employees.

NC Flex Plans

- Statewide Voluntary Dental Plan
- Statewide Voluntary Vision Plan
- Statewide Voluntary Cancer Plan
- Flexible Spending Accounts:
 - Health Care (HCFSA)
 - Dependent Care Expenses (DDCFSA)
- Statewide Voluntary Accidental Death and Dismemberment
- Group Term Life
- Statewide Voluntary Critical Illness Plan (new for 2009)

Notes:



NC/SHP Flex Annual Enrollment Process Overview

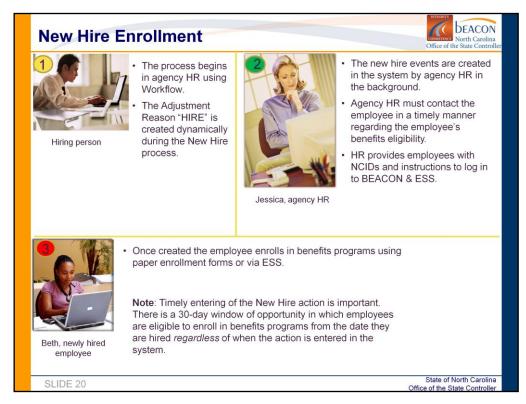
The NC/SHP Flex Annual Enrollment process includes all employees who are eligible for NC State benefits or SHP benefits. It uses the Employee Self-Service where possible, limited only to the employee's ability to access a computer and sign on to select benefits. Where access is unavailable, the employee completes a paper enrollment form and beneficiary information and returns completed forms to the Benefits Administrator for verification and entry into the SAP system.

This new functionality alleviates the need, during annual enrollment, for those employees with access to ESS to complete paper enrollment forms and for the Benefits Administrator to send the forms to the Benefits vendors for NC Flex benefits enrollment. It also allows the SAP system to be the system of record for enrollment. An electronic enrollment/change data file is sent to vendors instead of paper forms.

SHP and NC Flex will not provide any enrollment forms in their "Enrollment Kits" for BEACON Agencies.

Agency HR will need to download forms from the vendor websites to provide to employees not using ESS. Employees can also access the forms directly from the vendor websites.

Notes:



New Hire Enrollment

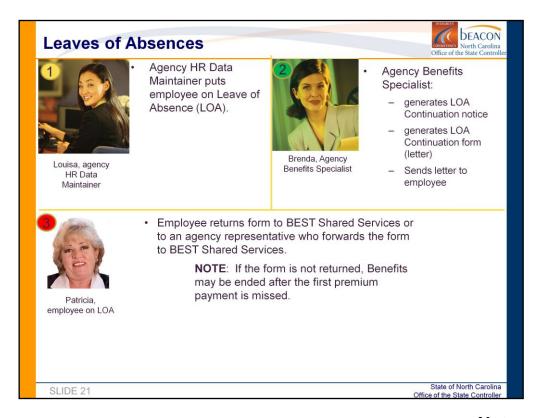
An employee must be hired before any benefits action can be performed. Employees with previous state work history must be rehired. When an employee is hired or rehired, a reason code is added to the employee's master data. The Reason for Action code details the specific reason for the hiring action.

Examples of Reason for Action:

- Hire
- Rehire

There is a 30-day time frame for employee enrollment. For example, if an employee is hired 11/17/08, he/she has until 12/17/2008 to enroll in benefits. If the hiring action is not entered until 12/1/08, the employee still only has until 12/17/08 to enroll.

Notes:



Forms

Prior to BEACON SAP implementation, agencies used various forms which were sent to a variety of locations.

Since the implementation, there is a standardized form (ZBNS008) used which is communicated to a single location within BEST Shared Services.

Leaves of Absences (LOA)

- Agency generates LOA (ZBNS008) Confirmation form and letter
- The employee returns the Confirmation form to BEST Shared Services.
- BEST Shared Services is responsible for communication with the vendor of the benefits.
- For Short Term Disability NC Flex will be on an after-taxes basis.
- · Premiums will be deducted on an after-tax basis.

Return Form (LOA)

- Employees contact BEST Shared Services to communicate that they have returned from a LOA and would like to re-enroll for Benefits.
- BEST Shared Services creates the Adjustment Reasons.
 Employees complete the enrollment process with ESS (Employee Self-Service) or send a paper enrollment form.

NOTE: The employee must re-enroll in the same Benefits elections or waiting periods may apply.

Notes:

Mandatory State Retirement Plans



- Enrollment in Mandatory State Retirement Plans is created automatically. (TSERS, LEORS, CJRS)
- BEST Shared Services monitors the system to ensure the correct employee is enrolled in the right plan.
- The retirement system notifies the employee directly to collect beneficiary information.
- Optional Retirement Program (ORP) Retirement (where agencies coordinate enrollment with BEST Shared Services)
 - Employees have 60 days from their hire date to complete retirement plan selection.

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Retirement Plans

Mandatory state retirement plans are created automatically.

NOTE: NC School of Science & Math will notify BEST Shared Services when a faculty member enrolls in the Optional Retirement Program (ORP). BEST Shared Services completes the retirement enrollment in the system. Eligible agencies have reporting capabilities to monitor employee enrollment.

Notes:

Notes:

State of North Carolina

Supplemental saving plans include:

401(k)

SLIDE 23

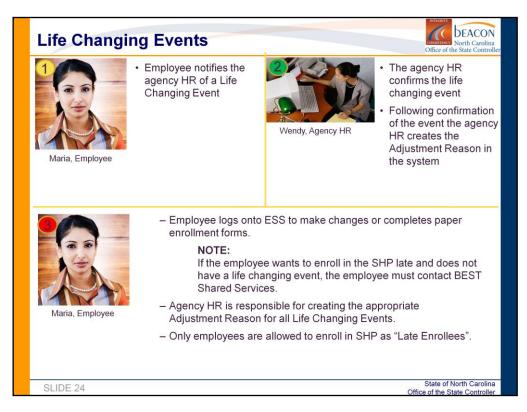
- 401(k) Roth Savings plans
- 457 Deferred Compensation plans
- 403(b) plans (Salary Reduction Agreement form)

Standardized form for all 403(b) plans

- Agencies who have 403(b) plans are required to have the employee complete the form.
- The employee then returns the form to BEST Shared Services.

The vendor of the savings plan will know if the employee is eligible for the plan.

- 401(k) New hires can enroll:
 - By telephone directly with the vendor
 - Online (online enrollment requires User ID & Password created by the employee)
 - Sending a paper form to the vendor
- 457 Deferred compensation plans automatically send a PIN number to all newly eligible employees:
 - By telephone directly with the vendor
 - Online (online enrollment requires User ID & Password created by the employee)
 - Sending a paper form to the vendor



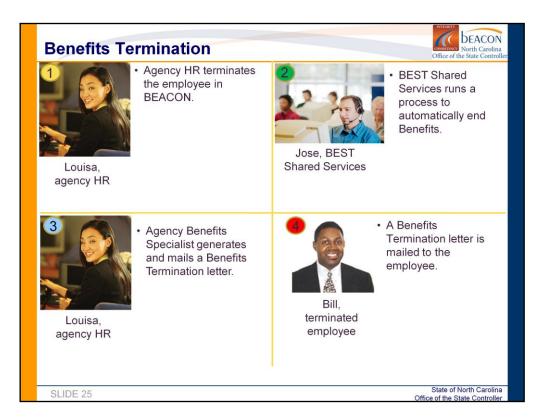
Dependents must have a qualifying event or wait until annual enrollment.

Qualifying events are also called "Family Status Changes" in many of the agencies.

NOTE:

Instructions on how to create Adjustment Reasons are available in the *PA310 Master Data Maintainer* course and the Web-Based Training course available through the BEACON Training website.

Notes:



Benefits Termination

An automatic batch is run nightly to stop benefits for employees who have separated from service. When an employee loses eligibility for reasons other than termination, an adjustment reason is created in the employee's master record and BEST Shared Services terminates the employee's benefits.

Health Plan Termination (New Policy - BEACON Reference Guide for State Employees):

"The termination date for the State Health Plan will be standardized for all employees across agencies. If an employee terminates (last work day) from the 1 – 15 of the month, a health plan deduction does not occur for that month and the employee's coverage ends at the end of the current month. If an employee terminates (last work day) from the 16 – end of month, a health plan deduction will occur for that month and the employee's coverage ends at the end of the following month."

Notes:

SAP uses Program Groupings to determine

- SAP uses Program Groupings to determine employee benefits eligibility participation.
- SAP uses a combination of the following fields to determine the values for Program Groupings:
 - Employee group
 - Employee subgroup
 - Personnel area
 - Planned work time

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DEACON

Notes:

It is important to understand that SAP uses a combination of organizational assignment data, such as Personnel area (agency), and Program Groupings to determine in which benefits plans an employee is eligible to participate. Program Groupings is technical jargon for a set of rules used by SAP to sort employees into different groups, depending on which plans you offer to different groups of employees. The Program Groupings used by BEACON are explained in the following six slides.

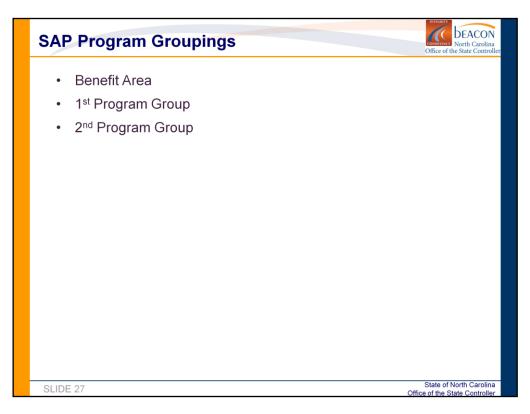
NOTE:

Employee group – The purpose of the Employee group is to define the position's appointment type such as SPA, EPA or supplemental staff as a few examples. It is used to establish rules for calculating leave and managing pay.

Employee subgroup – This field defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime and full-time/part-time status.

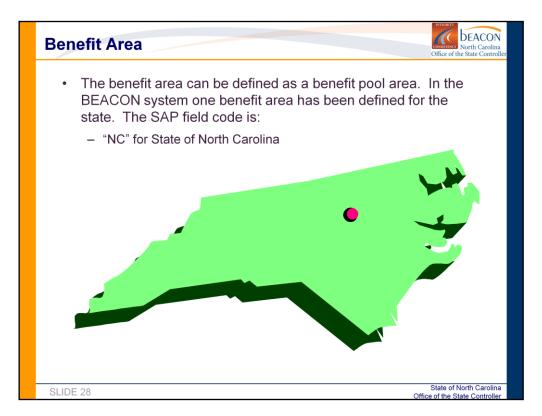
Personnel area – The Personnel Area is tied directly to the company code and is used by Payroll to identify the specific agency for whom the employee works. A company code can include one or more Personnel Areas.

Planned work time – This infotype determines the weekly planned working time for a position.



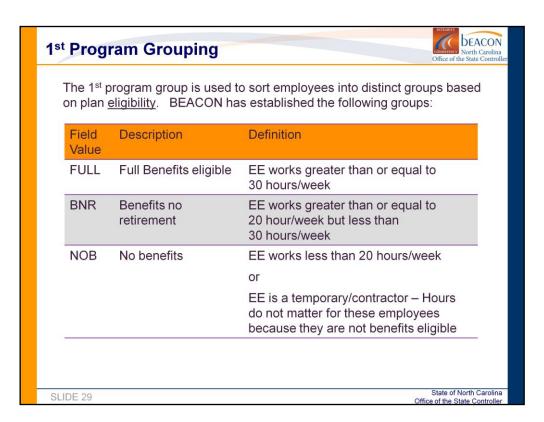
SAP uses these three program groupings to determine which benefits plans are offered to an employee:

- Benefit Area
- 1st Program Group
- 2nd Program Group



The Benefit Area is the first sub-division of benefit information. The State of North Carolina has defined one benefit pool that contains all state employees.

Notes:



The first program grouping allows you to sort the "Benefit Area" into different groups, depending on which plans you offer to different groups of employees. BEACON has defined three first program groups based on the planned worked hours and employee groups such as SPA, Permanent, Probationary, Time-Limited, etc. The following descriptions summarize the eligibility rules for the State Health plan, NC Flex plans, and the State Retirement system based on the planned worked hours.

State Health Plan (SHP)

If employees work at least 30 hours per week, they and their dependents are eligible to enroll in a health insurance plan. The state pays for employee coverage in the State Health Insurance program. Employees must pay for family or dependent coverage. If an employee works at least 20 hours but less than 30 hours per week, the employee is still eligible for the SHP but on a full contributory basis.

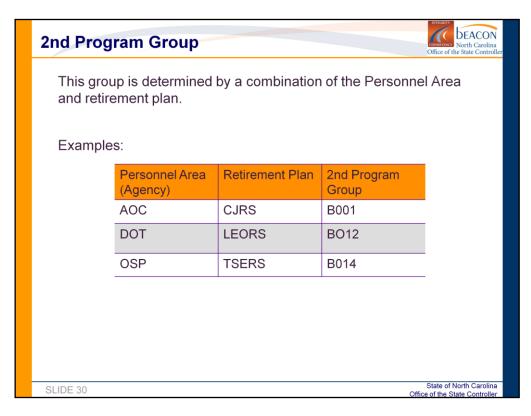
NCFlex

Employees are eligible to participate in NCFlex if they are a state agency, university or select community college employee working 20 or more hours per week in a permanent, probationary or time-limited position. They may check with their Agency HR concerning their benefit eligibility.

Retirement

An employee with a permanent, probationary, time-limited or trainee appointment, who works at least 30 hours per week for nine months of the year, is automatically a member of the State Retirement System. Participation in the Retirement System of North Carolina is mandatory for every permanent, probationary, time-limited or trainee appointment employee who works at least 30 hours each week.

Notes:



The 2nd Program Group is used to further sort employees into a more distinct sub-group based on the employee's agency and retirement plan eligibility. The most common group is B014, which denotes the benefits plans available to a regular state employee and includes the Teachers and State Employees Retirement System (TSERS).

Please refer to the Benefit Program Groupings job aid located on the BEACON University web site for a complete list of benefit program groupings.

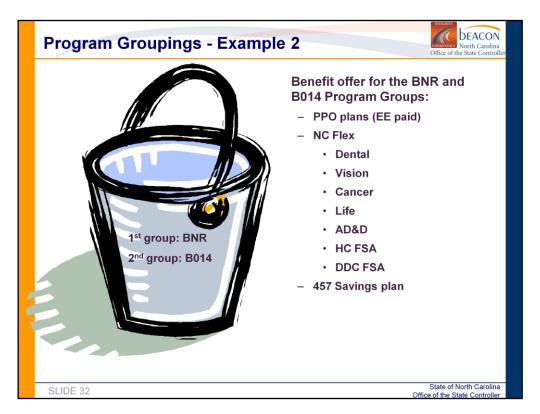


As an example, this slide lists the benefit offer to an employee that falls in the following program groups:

 1^{st} Programming Group = FULL

2nd Program Group = B014

NOTE: 403(b) Saving plans are an agency-specific benefit. Five agencies offer 403(b) savings plans.



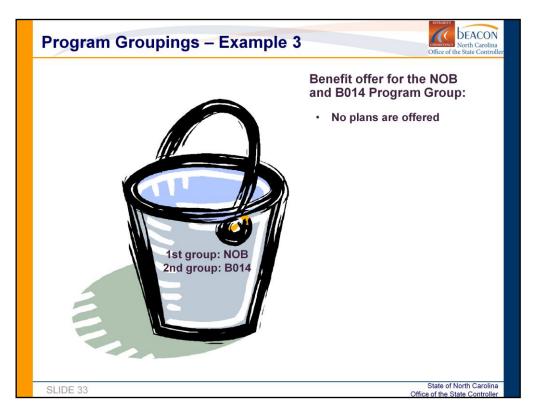
As an example, this slide lists the benefit offer to an employee that falls in the following program groups:

 1^{st} Programming Group = BNR

2nd Program Group = B014

NOTE: Retirement plans are not part of BNR. Employees are responsible for the full cost of premiums.

Notes:

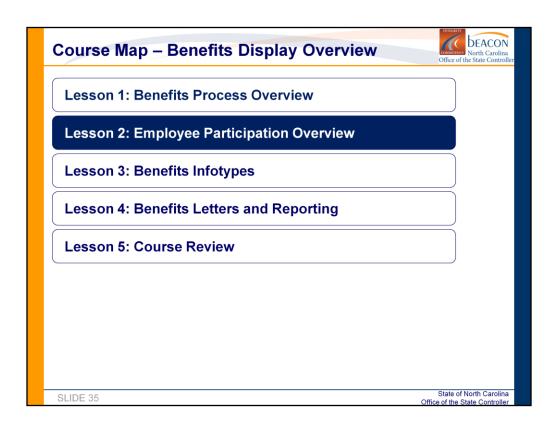


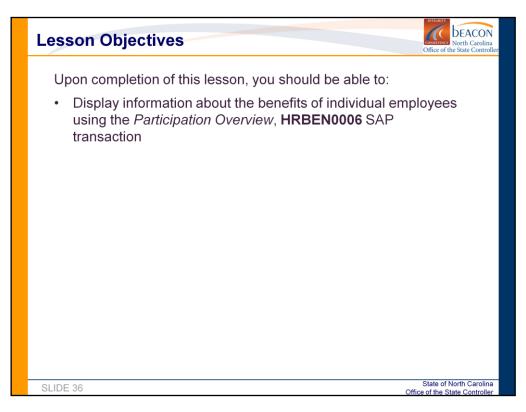
Although the SAP system will not offer benefits plans to employees in the NOB 1st Program Group, the system still displays the valid 2nd Program Groups based on the employee's combination of the Personnel Area.

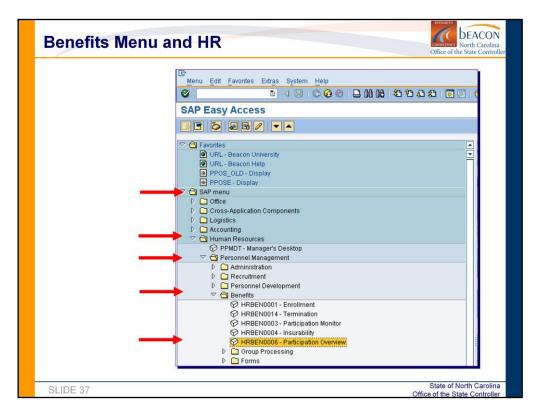
Notes:

In this lesson, you learned to: Identify what policies the system will enforce Explain the Roles and Responsibilities of the key players Describe the benefits business processes Explain how SAP determines which benefits to offer an employee

Notes:







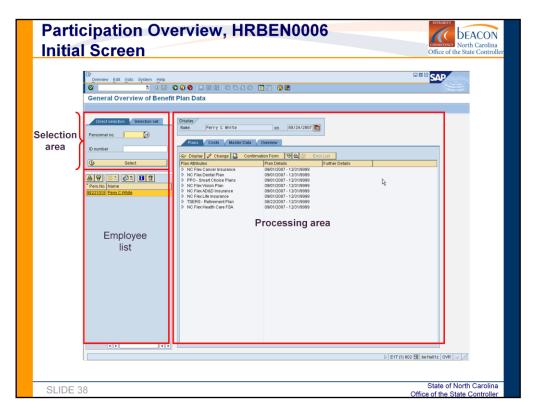
Benefits is a component of Personnel Management and is found below Personnel Management in the SAP standard menu. In this lesson you are going to learn how to use the Participation Overview transaction to inquire on an employee's benefits information.

The Participation Overview, **HRBEN0006** transaction allows you to display a summary list of all of the benefit plans in which an individual employee is enrolled. From the *General Overview of Benefit Plan Data* screen, you can select (or highlight) a plan and then display employee information for the plan.

To access the Participation Overview from the SAP Easy Access menu, choose *Human Resources > Personnel Management > Benefits > Participation Overview* or type **HRBEN0006** in the Command field and then press the **Enter** button.

Navigation Tip: To display transaction codes in the Easy Access menu:

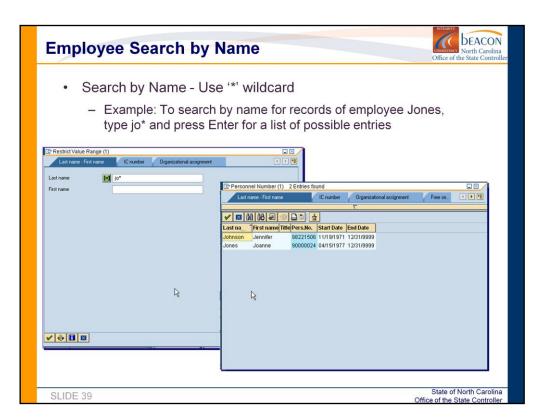
- Select Extras > Settings to display the settings dialog box.
- Select the Display technical names checkbox.
- 3. Click the Continue (Enter) button. The transaction codes will now display in the menu tree.

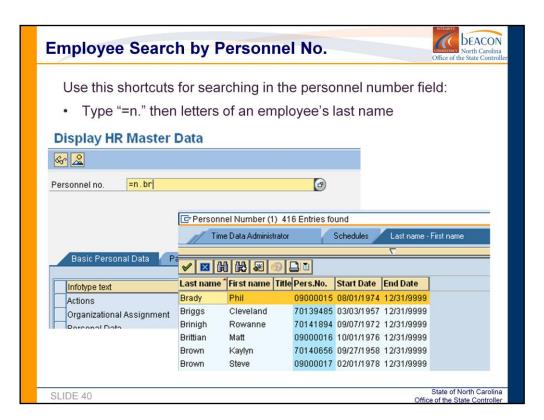


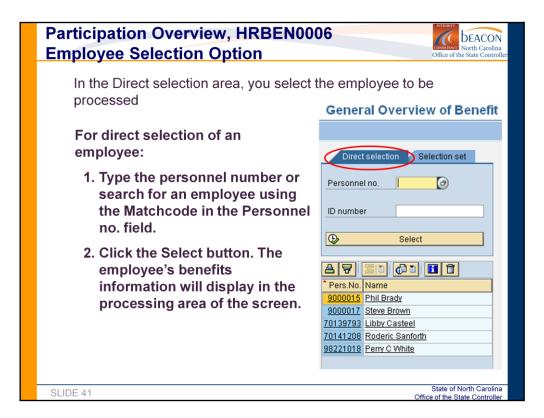
To display benefit information for an employee, perform these actions:

- 1. Select the employee for whom you want to display an overview. The employee will display in the Employee List area of the screen.
- Click on the employee to display his or her benefit information in the Processing area. Once an employee has been selected, the following tab pages will become active, showing the different categories of information:
 - Plans
 - Costs
 - Master data
 - Overview

Notes:



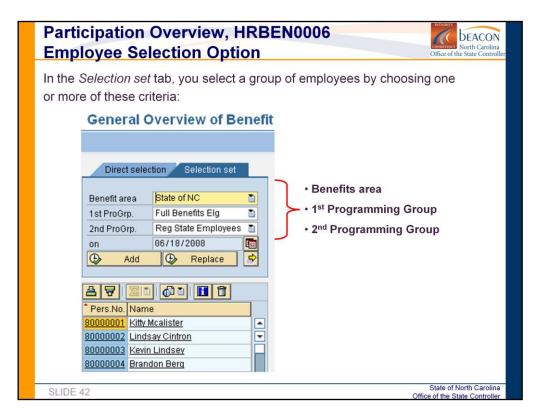




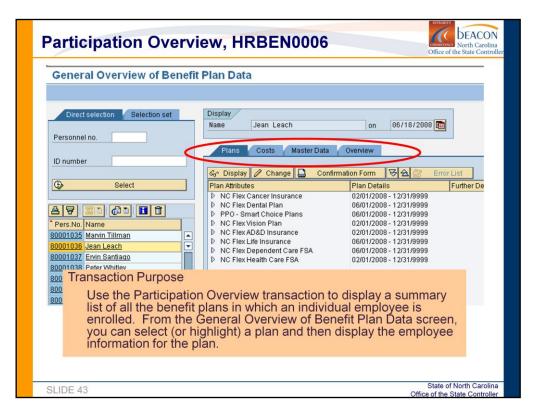
The transactions for individual employees processing in the Benefits module enable you to select employees for processing and perform your processing tasks on a single screen. You initially select employees for inclusion in the employee list, which is displayed throughout processing. From this list, you then select and process individuals.

In the selection area, you select the employees that you want to process. The selection technique that you use depends on whether you want to select individual employees or groups of employees.

To select individual employees, enter the employee's personnel number on the *Direct selection* tab and choose the Choose/Select button. You can also type "=n.lastname" in the personnel number field and choose the Choose/Select button (example: **=n.brady**).



To select a group of employees, enter groupings on the *Selection* tab. Click the **Choose/Add** button to add employees to your selection to the employee list or click the **Replace** button to replace the contents of an existing list with your selection.



Once an employee has been selected, a series of tab pages become active, showing the different categories of information. The Plans tab is the default page.

Helpful tip: When you double click on the plan name, the infotype record displays. We will learn about benefits infotypes in the next lesson. In the meantime refer to the Benefits Infotype Quick Reference located in the back of your Student Guide. This document is also available on the BEACON University web site.

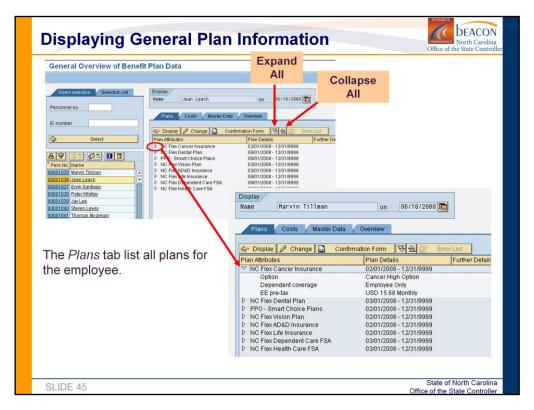
Notes:



Watch as your instructor demonstrates how to display an employee's benefits information, by plan, using the Participation Overview, **HRBEN0006** SAP transaction.

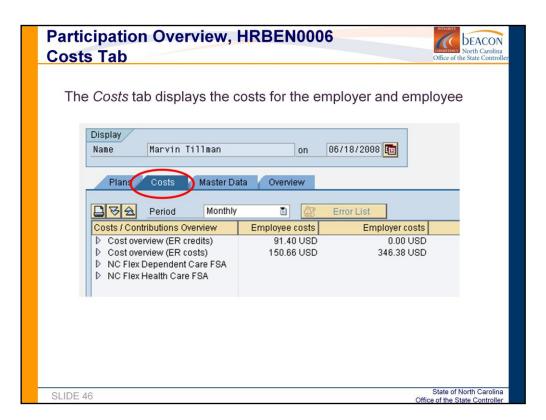
Note: BEACON Help can be accessed from any SAP screen. The online help provides step-by-step procedures by screen. It also includes links to complete step-by-step procedures that you can print and it includes links to simulations.

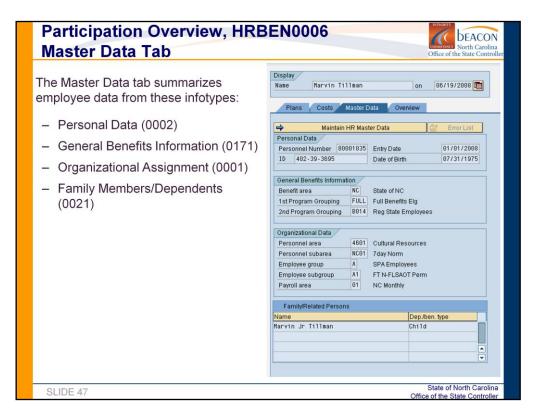
Notes:



To display general plan information for the selected employee, click on the right-facing arrow next to the plan name or click the Expand All button to display general plan information for all plans.

NOTE: If you double click on the Plan Title line, it will display details in the infotype view. You will learn more about infotypes in the next lesson.

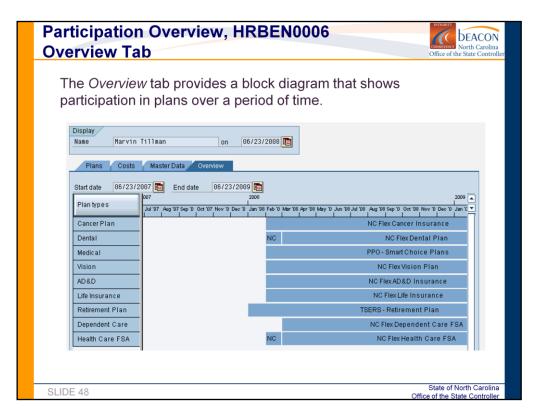




Organizational Assignment – Displays an employee's organizational structure and the personnel structure

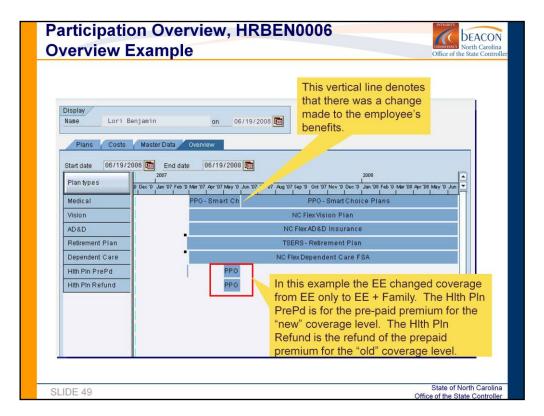
Personal Data - Stores data for identifying an employee, such as name, SSN, and DOB

Notes:



Observe that Marvin is a recently hired employee as of January 1, 2008. His health and NC Flex choices were eligible to begin February 1, 2008. Notice that his retirement started in January.

Notes:



Display Participation Overview – HRBEN0006 Jean Leach has had some life change events and needs to know her current benefits status. She would like for you to review all of her benefit plans. Use the HRBEN0006 (General Overview of Benefit Plan Data) transaction to view the overall benefits picture. Instructions: Log on to SAP using the steps provided by the instructor. Use the Participation Overview, HRBEN0006 (General Overview of Benefit Plan Data) transaction to view all of the benefits listed for Jean Leach. Practice using the Direct selection tab to view a program group.

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State of North Carolina

Notes:

Work Instruction: Participation Overview, **HRBEN0006**Data:

Personnel number - 80001036

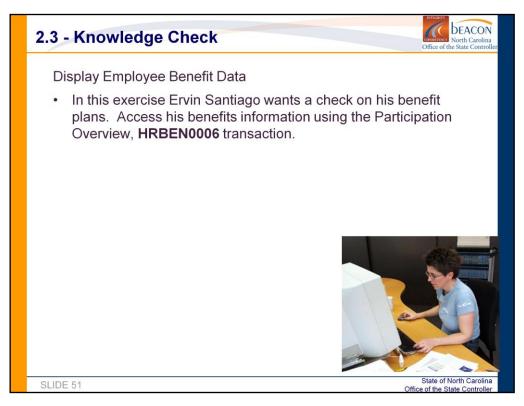
Questions/Results:

- 1. How many dependents does Jean have?
- 2. What is Jennifer's pre-tax contribution in the:
 - NCFlex Health Care FSA plan
 - NCFlex Dependent Care FSA plan
- 3. Which tab displayed this information?

Helpful Hint:

To log on to SAP in the classroom:

- Access the SAP portal web page.
- Enter the User ID and password that is assigned to your classroom PC.
- 3. Click on the Log on button.
- 4. Click Yes to confirm the security message displayed.
- 5. Click on the SAP GUI tab.
- 6. Click on the training client specified by your instructor.
- 7. Stop when you have reached the Easy Access screen.



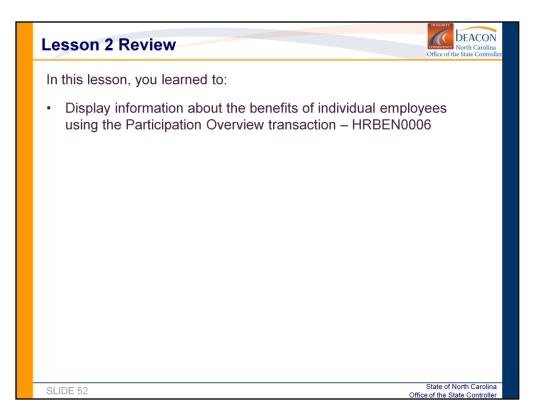
Work Instruction: Participation Overview, HRBEN0006 Data:

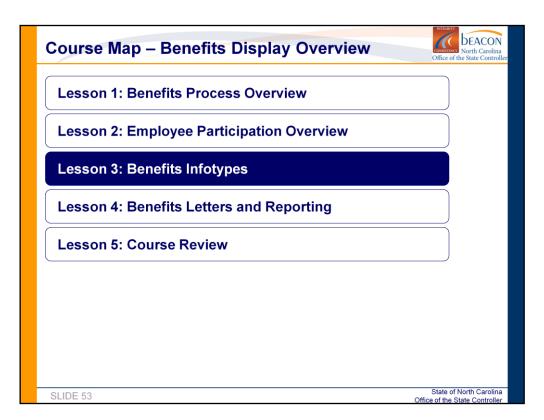
Personnel number – Search for Ervin Santiago's record.

Questions/Results:

- 1. In which benefits plans is Ervin enrolled?
- 2. How many dependents does Ervin have?
- 3. What is the annual pre-tax contribution to the dependent care FSA?
- 4. In what retirement plan is Ervin enrolled?

Notes:





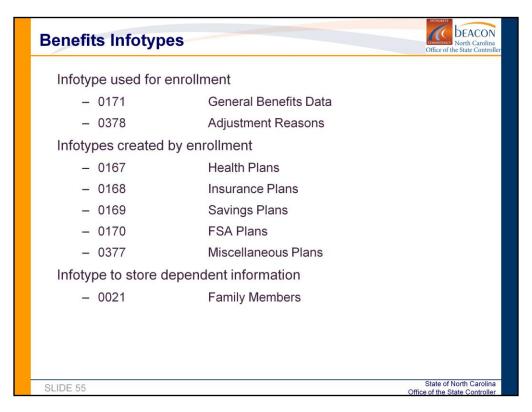
Upon completion of this lesson, you should be able to. Identify benefits infotypes and subtypes Display individual benefit infotypes for an employee using the PA20, Displaying HR Master Data for Benefits, transaction Identify the reason for an adjustment

In the previous lesson we reviewed how benefits infotypes can be accessed using the Participation Overview. The **PA20** transaction, Displaying HR Master Data for Benefits, is another method that you can used to display a specific benefit infotype. In this lesson we will use that SAP transaction to familiarize you with the information contained in some key infotypes for benefits.

SLIDE 54

Notes:

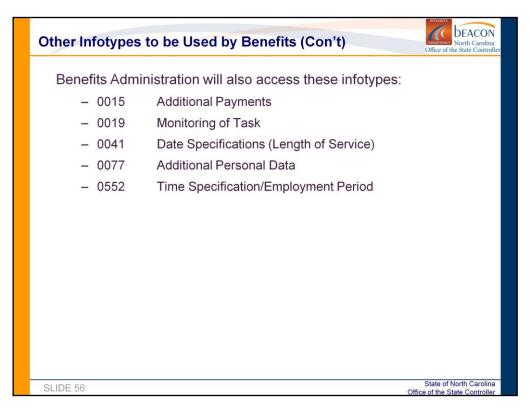
State of North Carolina



An infotype, in simple terms, is a screen that stores particular employee HR master data information. This slide lists the benefits infotypes. In this lesson we will discuss these infotypes:

- 0021 Family Members
- · 0167 Health Plans
- 0171 General Benefits Data
- 0378 Adjustment Reasons

The Miscellaneous Plans infotype (0377) is used for processing SHP prepaid premium and other premium adjustments.



Additional Payments – Used to define wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined period. This infotype is used for the collection of premiums for agency-specific benefits.

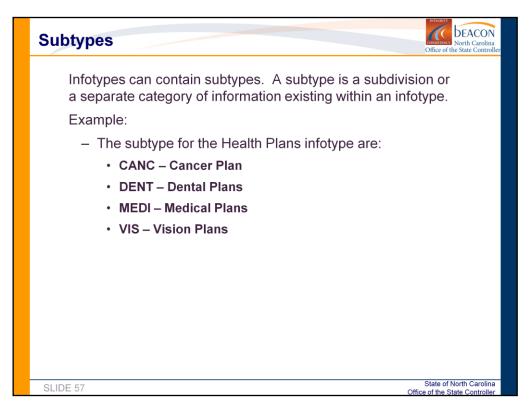
Monitoring of Task – Used to create date-driven tasks that have follow-up activities. Depending on the selected task type, the system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule. Examples include the expected return date of an LOA, the date vacation will run out for an LOA, the date a foster child was added as a dependent, and the date a foster child's eligibility was proven.

Date Specifications – Stores dates that are required by the State, such as Original Hire Date, Agency Hire Date, Last Day Worked, Notification of RIF, Lottery Anniversary Date, and 457 Catch-up date

Additional Personal Data – Stores military status, ethnic origin and disability status as required for EEO-1 and BETS-100 reporting

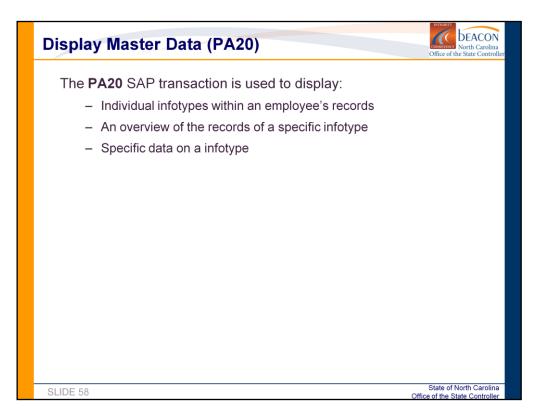
Time Specification/Employment Period – Stores additional employment or absence periods for the calculation of the employment period

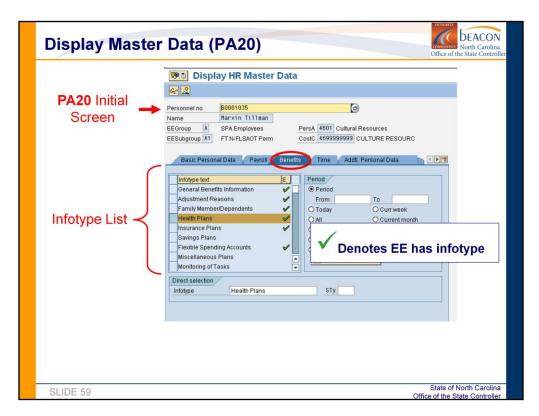
Notes:



Please note that some infotypes have subtypes. For example, the subtypes for Health Plans are cancer, dental, medical, and vision plans.

Notes:



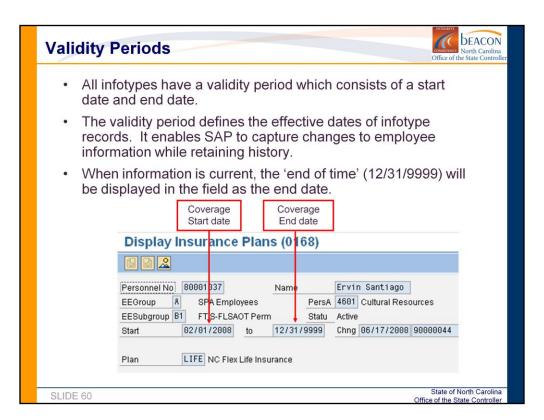


The **PA20** SAP transaction is used to display:

- Individual infotypes within an employee's records
- An overview of the records of a specific infotype
- Specific data on a infotype

The initial screen for the **PA20** SAP transaction lists the infotypes that have been established for an employee. To display a list of benefits infotypes, click the Benefits tab.

Notes:



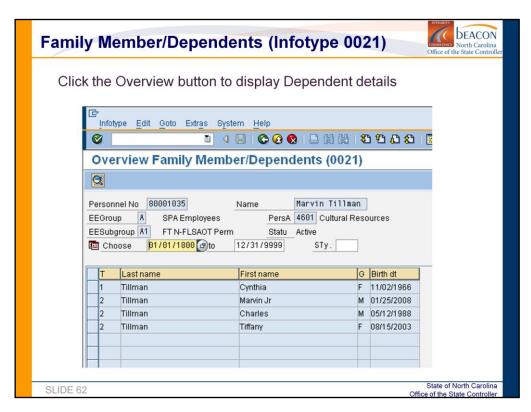


In a moment your instructor will demonstrate how to access the Family Members/ Dependents infotype using the **PA20** transaction. The **PA20** transaction allows you to display employee information. In general, all the current information we have about an employee in SAP can be viewed from this transaction.

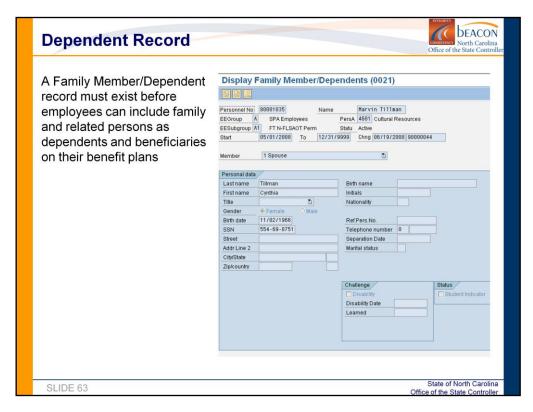
The basic steps for using the **PA20** transaction are:

- From the Easy Access screen, click in the Command field and type PA20.
- 2. Click the **Enter** button. The *Display HR Master Data* screen displays.
- 3. Type or select the employee's personnel number in the **Personnel no**. field.
- 4. Type **0021**, for Family Member, in the Infotype field. Keep in mind that only those infotypes that have a green check contain data.
- Click either the **Display** (F7) button or **Overview** (Shift + F8). The employee's master data for the specified infotype displays. Display shows each dependent record. Overview allows you to select the dependent to view.

Notes:



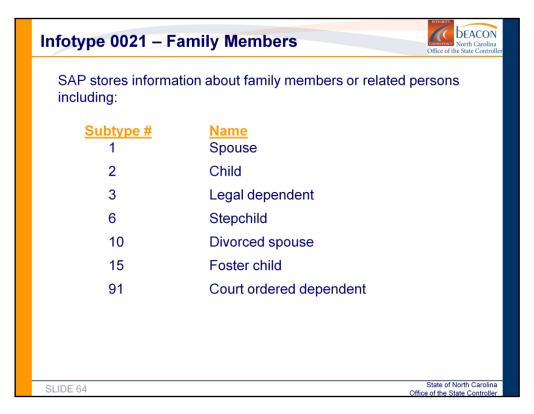
This screen is the result of clicking the Overview button on the Display HR Master Data screen for the Family Member/Dependent infotype (0021). Notes:



The Status and Challenge indicators are relevant to dependent children over:

- 19 years old and who are full-time students.
- 26 years old who are medically disabled.

When these indicators are checked, the system allows the dependent to continue to be eligible for health plans. Notes:



There are seven entries for the subtype for this infotype including spouse, child, legal dependent, stepchild, divorced spouse, foster child, and court ordered dependent. These family members are available as dependents.

This infotype is also used to establish beneficiary information in other subtypes:

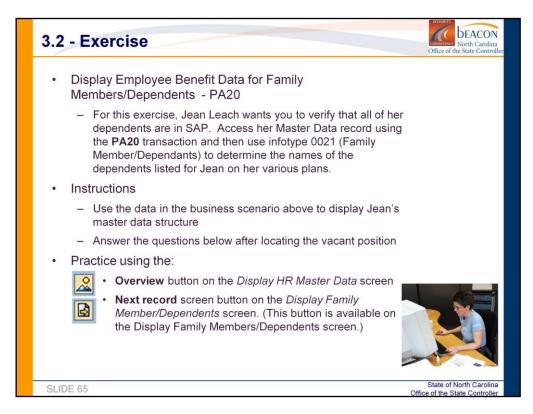
8 Related persons

11 Father

12 Mother

16 Other

Notes:



Work Instruction: Displaying HR Master Data for Benefits,

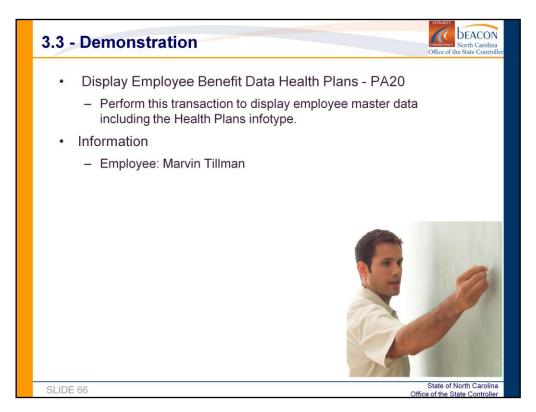
transaction code, PA20

Data:

Employee Name - Jean Leach

Question/Result:

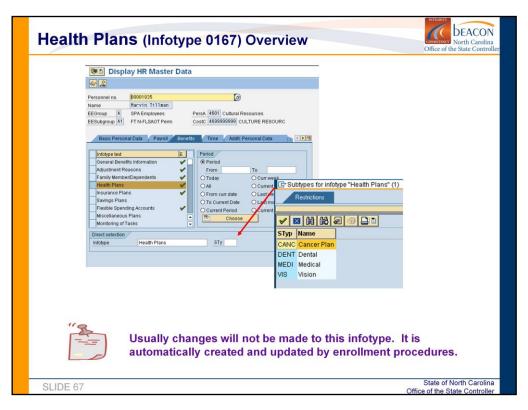
1. How many dependents does Jean have?



Watch your instructor demonstrate how to access transaction code **PA20** to display master data, specifically the Health Plan infotype IT 0167.

The **PA20** transaction allows you to display employee information. In general, all the current information available for an employee in SAP can be viewed from this transaction.

Notes:



This infotype stores details of the health plans in which the employee is enrolled. For each health plan in which the employee participants, a separate record exits.

The following four subtypes have been defined:

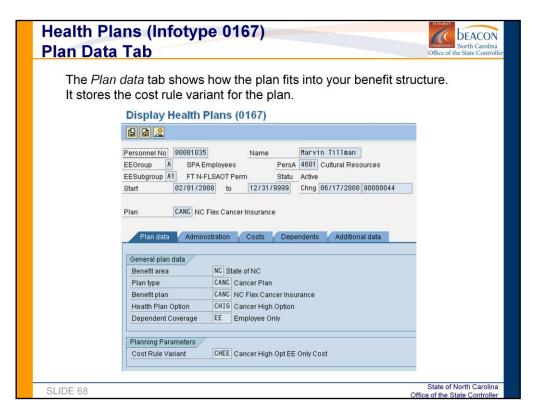
CANC - Cancer

DENT - Dental

MEDI - Medical

VIS - Vision

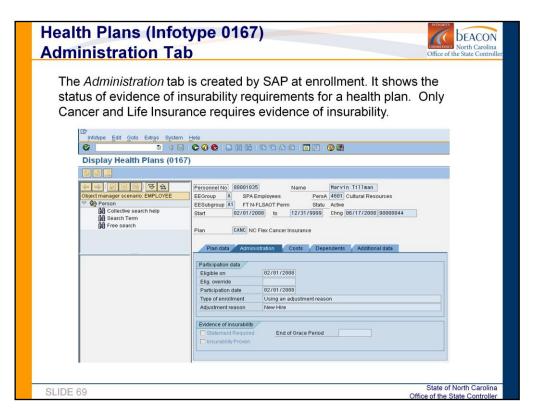
Notes:

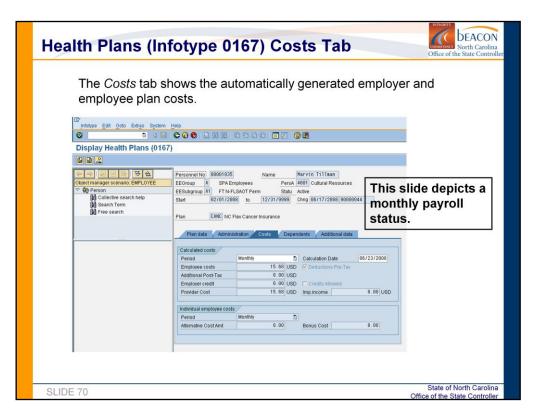


Once an infotype has been selected, a series of tab pages will become active, showing the different categories of information. The Plan data tab is the default page.

The Additional data is not being used by BEACON.

Notes:



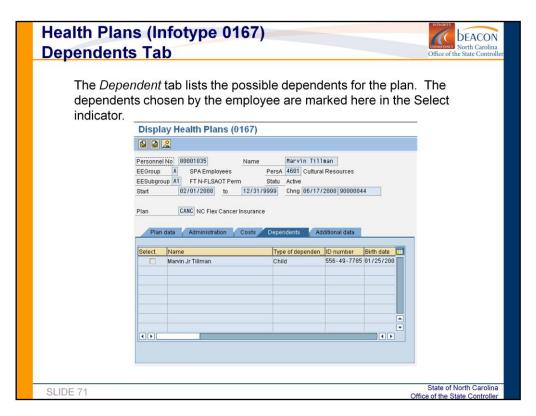


This slide illustrates an employee on a monthly pay cycle. The deductions shown are the monthly premium amounts.

For employees assigned to the bi-weekly pay period, as denoted in the Payroll Status field, the cost displayed by SAP is calculated on 26 bi-weekly pay periods per year. The State's actual calculation of cost is based on 24 bi-weekly pay periods per year. In other words, this tab does not display the actual costs being deducted.

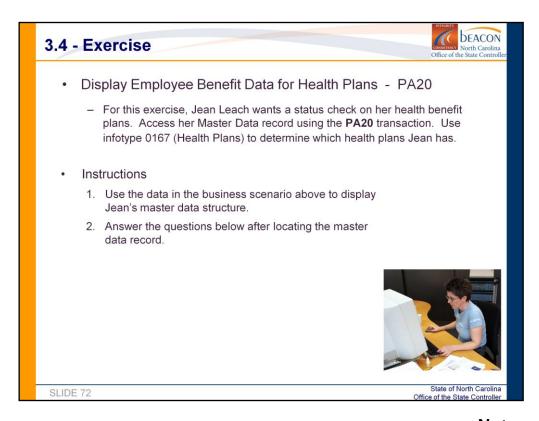
Calculation date information and the Deductions Pre-Tax checkbox can be found on the left-hand side of the screen.

Notes:



The Additional data tab is not being used by BEACON.

Notes:



Work Instruction: Displaying HR Master Data for Benefits,

transaction code PA20

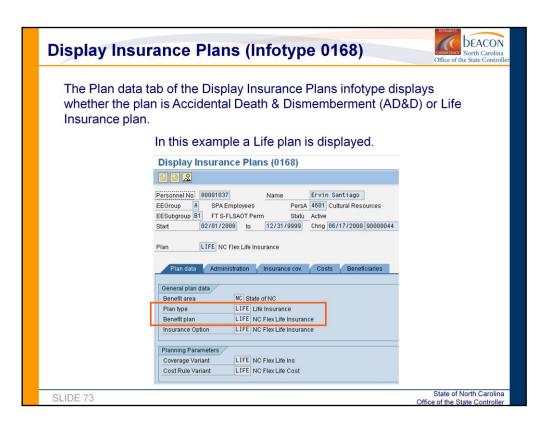
Data:

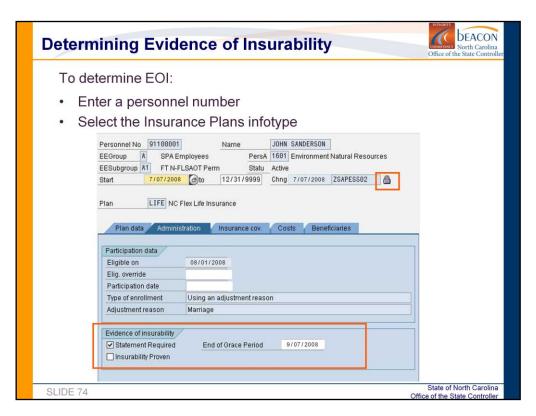
Employee - Jean Leach

Questions/Results:

- 1. How many health plans does Jean have?
- 2. How did you determine your results?
- 3. Does Jean have the Vision plan?
- 4. What is Jean's month premium for the PPO?
- 5. Which tab page did you view to determine your result?

Notes:

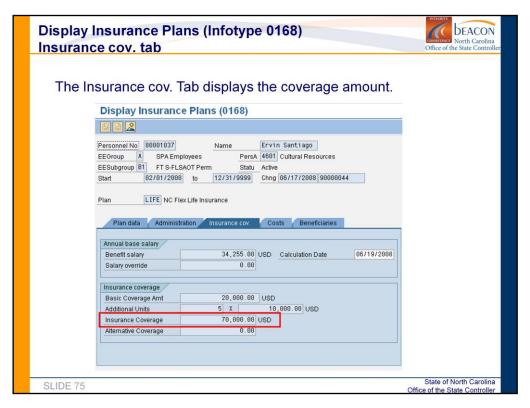




The Administration tab is crucial because it contains Evidence of Insurability (EOI) information:

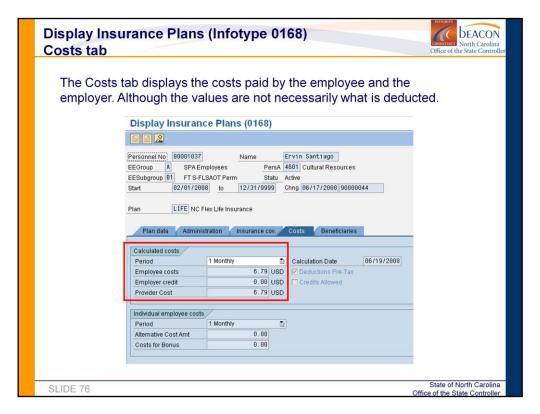
- The Statement Required checkbox denotes whether or not the employee must prove their health status to the vendor of the insurance. If the Statement Required checkbox is selected the record is locked.
- The Insurability Proven checkbox denotes whether EOI has been proven.
- End of Grace Period
 - This is the 60-day period by which the EOI should be proven.

Notes:



The Insurance Coverage field displays the total coverage amount. If an amount is listed in the Alternative Coverage, this is the amount of insurance upon which the employee's premium is based. This Alternative Amount occurs when a Life Insurance plan is pending for EOI approval.

Notes:



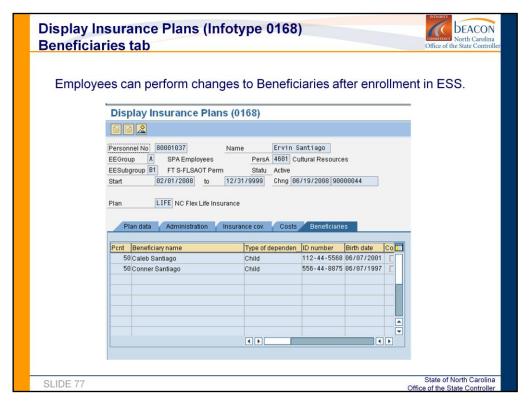
The Admin and Beneficiary tabs are not shown. The types of data displayed are the same as Infotype 0167 (Health Plans).

The example above is displayed for a monthly employee. For biweekly employees, the State's actual calculation of cost is based on 24 bi-weekly pay periods per year. In other words, the cost tab does not display the actual costs and should only be used as general information. The actual costs is calculated through the payroll process.

The Admin tab displays:

- Eligible on date
- Participation date
- Type of enrollment
- Adjustment reason

Notes:



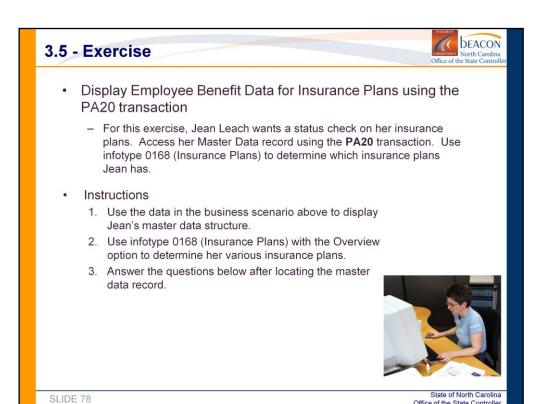
The Benefits tab displays:

- · Name of the Beneficiary
- Type of Beneficiary

The Start date may not be the original coverage start date, if the date is something other than the first of the month, check the Administration tab to see if the last change made was a Beneficiary Change.

NOTE: Beneficiary information is only listed if the employee completed the beneficiary change by ESS. If the employee completes the beneficiary changes by a form, the form is sent to the vendor and not entered in BEACON.

Notes:



Work Instruction: Displaying HR Master Data for Benefits,

transaction code PA20

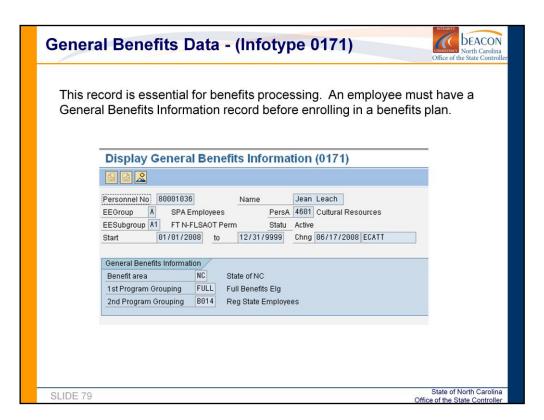
Data:

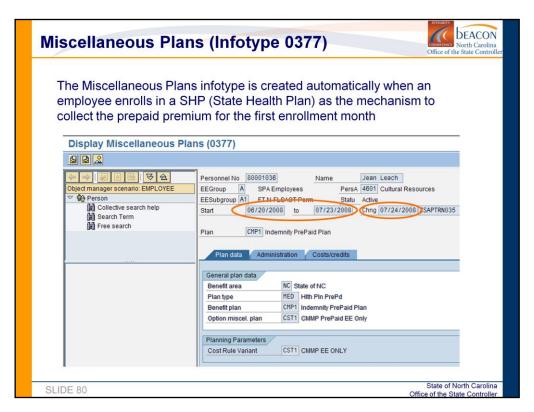
Employee name – Jean Leach

Questions/Results:

- 1. How many insurance plans does Jean have?
- 2. How did you determine your results?

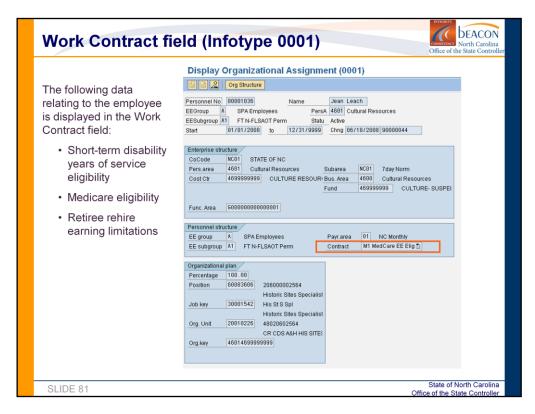
Notes:





The Miscellaneous Plans infotype is created automatically when an employee enrolls in a SHP (State Health Plan) as the mechanism to collect the prepaid premium for the first enrollment month. For example, if an employee is hired 6/19/07 and has selected to start the SHP plan on 8/01/07, then the validity dates for this infotype will be 7/01/07 to 07/31/07 to collect the prepaid premium for the first month of enrollment in the plan. Subsequent premiums will be automatically occur as a payroll deduction. This infotype is automatically created through a nightly batch processing job based on that day's enrollment.

Notes:



Through the Work Contract field you can:

- Access the Work Contract field via SAP transaction PA20.
- Enter a personnel number.
- Select the Organizational Assignment infotype (0001).
- Open the drop-down (match code) to view possible entries.
- In this example the employee is eligible for the State Medicare Health Plan rate.

The agency STD Administrator or BEST Shared Services populates the work contract field for one of several events:

- Short-term Disability (STD) yrs of service eligibility
 - This automatically changes the deduction amount to Employee Full Pay if changed to SHP-STD<5 RTMT.
- Medicare Eligibility
 - BEST Shared Services uses Medicare codes to adjust an employees deduction, so that SHP Medicare rates are applied.
- Retiree rehire earning limitations

STD & Medicare eligibility enables the system to collect the correct premium amount for health insurance as well as controlling the cost of SHP.

Retiree rehire earning limitations are used to report to ORBIT employees subject to earning limitations.

Notes:

How Adjustment Reasons are Created



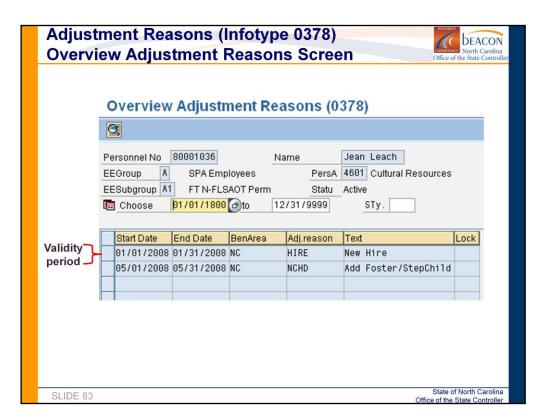
- For qualifying events such as new hire that require the HR administrator to perform a personnel action, SAP automatically generates the appropriate adjustment reason infotype.
- For life qualifying events that do not require a personnel action to be performed, the HR administrator creates the adjustment reason infotype using transaction code PA30.
- All other adjustment reasons are created by BEST Shared Services.

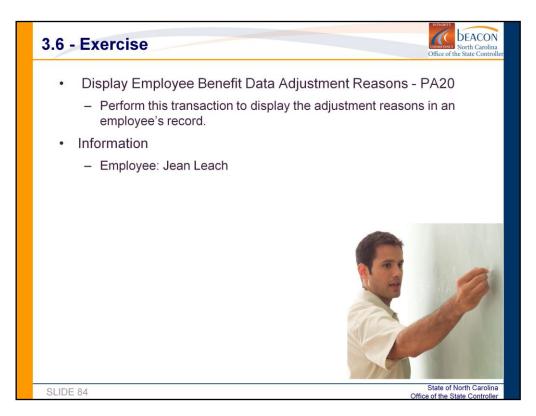
SLIDE 82

State of North Carolina
Office of the State Controller

An adjustment reason infotype record is required before a change in an employee's benefits can occur. The execution of personnel actions that affect an employee's benefits will automatically create the appropriate adjustment reason with the correct enrollment date. For qualifying events that do not require a personnel action, such as additions or deletions of dependents, the HR administrator must create the adjustment reason.

Notes:





Work Instruction: Displaying Employee Benefit Data Adjustment Reasons, transaction code **PA20**

Data:

Employee name – Jean Leach

Notes:

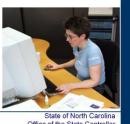
3.7 - Knowledge Check



- · Display the Employee Benefit Data for an Employee
 - Display infotype 0170 (Flexible Spending Account)
 - Display infotype 0169 (Savings Plan)
 - Display infotype 0377 (Miscellaneous Plans)
 - Display the Contract field using infotype 0001
- Information:
 - Employee: Peter Whitley

Instructions:

- Use the data in the business scenario above to display spouse and dependant information.
- 2. Change infotypes 0021 as required.
- Answer the questions below after locating the master data record.



SLIDE 85

Work Instruction: Displaying HR Master Data for

Benefits, transaction code PA20

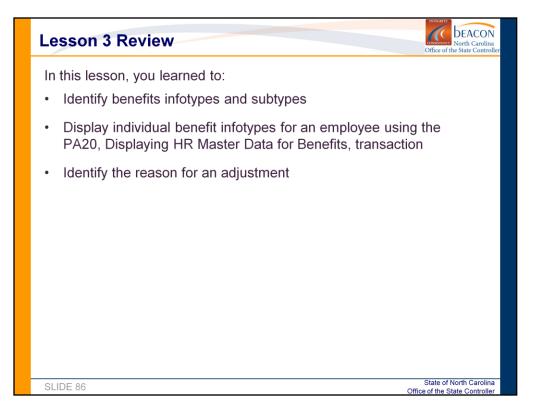
Data:

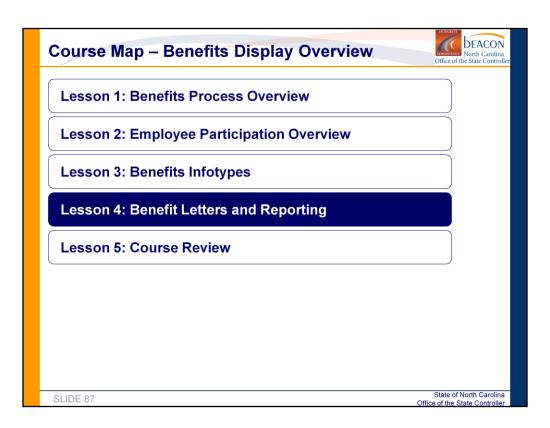
Employee name – Peter Whitley

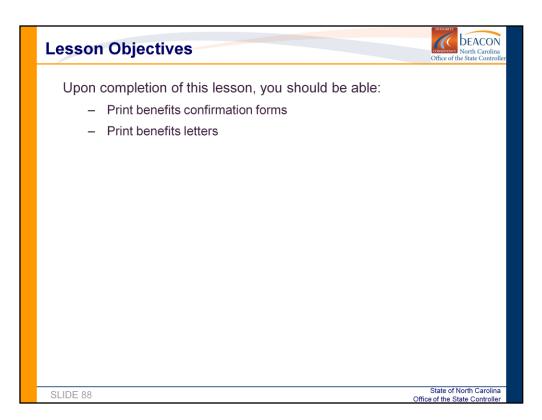
Questions/Results:

- 1. What type of Flexible Spending Account does Peter have?
- 2. What is Peter's monthly contribution towards his Savings Plan?
- 3. Is Peter enrolled in any Miscellaneous Plans? If so, what type of plan?
- 4. What did you learn about Peter's benefits status after viewing the Contract field?

Notes:







Print Confirmation Form, HRBEN0015 Transaction Overview Purpose - Use this transaction to print a confirmation form at any time. Features You can select multiple employees by using the Multiple Selection for Personnel Number dialog box. You can preview or display the form You can specify a date range

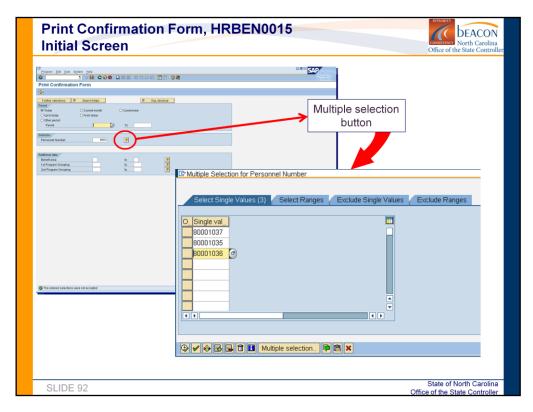
Notes:

					Office of the
(INCIDENCE)		RTH CAROLINA			
MA DEACON	1425 MAIL SE RALEIGH, NC	RVICE CENTER			
DEACON	iotezion, no	21000-1420			
Office of the State Controller					
	Benefits Confirm	nation Stat	ement		
Ervin Santiago	Personnel No	. 80001037		DATE 06/19/2008	
806 Lilac Lane	Per sonnel Ar	ea Cultural Reso	urces	34301932222474383332	
Jesup, NC 27609	Payroll Area	NC Monthly			
Listed below are your most recent ele- benefit plans. Changes to your plans during open enrollment. If you have ar at 1-866-NCBEST-4U.	can only be made if your eligit	bility changes du	e to a qualifying eve	ent or you make changes	
HEALTH PLANS					
NC Flex Cancer Insurance		02/01/2008 -	12/31/9999		
Option		Cancer High	Option		
EE Pre-tax		15.68 USD			
NC Flex Dental Plan		02/01/2008 -	12/31/9999		
Option		Dental High	Option		
EE Pre-tax		80.92 USD			
Dependents in period 02/01/20 Caleb Santiago	08 - 12/31/9999	Child	Date of Birth	06/07/2001	
Conner Santiago		Child	Date of Birth	06/07/1997	
40000 000000000000000000000000000000000					
PPO - Smart Choice Plans		02/01/2008 -			
Option EE Pre-tax		Smart Choice 150.66 USD	Basic 70/30		
Employer Cost		346.38 USD			
Dependents in period 02/01/20	00 12/21/0000	346.36 030			
Caleb Santiago	00 - 12/31/0000	Child	Date of Birth	06/07/2001	
Conner Santiago		Child	Date of Birth	06/07/1997	
INSURANCE PLANS					
NC Flex Life Insurance		02/01/2008 -	12/31/9999		
Option		NC Flex Life			
		70 000 00 11			

The plans in which an employee is participating on the selection date are listed in the form.

Notes:

If you want to	Then
Print or display confirmations for current date,	select the Today radio button.
Print or display confirmations from the beginning date to the end date of the current month,	select the Current Month radio button.
Print or display confirmations from 01/01 to 12/31 of the current year	select the Current year radio button.
Print or display confirmations up to today,	select the <i>Up to today</i> radio button.
Print or display confirmations from today through 12/31/9999,	select the <i>From today</i> radio button.
Enter a date range to print or display confirmations,	select the <i>Other period</i> radio button and enter the begin date in the <i>period</i> field and the end date in the <i>to</i> field.

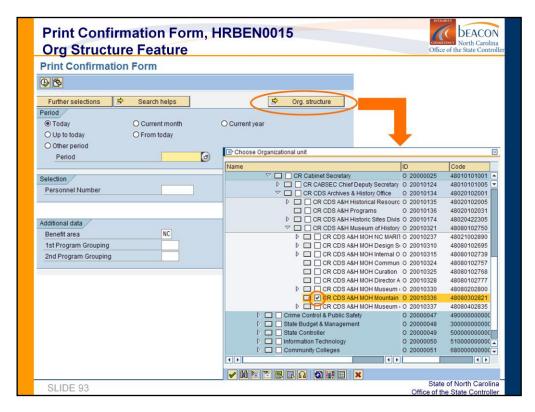


You can type or search for personnel numbers in the Single Values column. Click the Copy button to transfer your selections to the initial screen. (**NOTE**: Only the first personnel number will be displayed on the screen.)

Once you click the Execute button, the Print Confirmation Form screen displays listing the selected employees as shown in the following screen image:



Notes:



You can also mass print forms for an entire org unit by choosing the Org Structure button on the upper right side of the form selection area.

Click on the Org Structure button. The Choose Organizational Unit pop-up box is displayed. Open the tree down to the level you wish to print. Click the check box in front of the org unit and click the green check mark to "load" the data to print.

Continue entering the necessary data on the HRBEN0015 screen. Click on the Execute icon. The list of persons from the org unit is displayed. You can select all or as many as you desire for whom to print forms.

Remember, you can only print forms for the those persons for whom you are authorized to view.

Notes:

4.1 - Walkthrough



- Print Confirmation Form HRBEN0015
 - In this exercise, Jean Leach needs a printed confirmation form detailing her benefit selections for her financial planner. She does not have access to ESS so she needs you to print the benefits overview for her.
- Instructions
 - Use the HRBEN0015 (Print Confirmation Form) transaction to display a copy of her plan.

Important: The training classroom is not set up to print, so for this exercise, select the display form option instead of the print option.



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State of North Carolina
Office of the State Controller

Work Instruction: Print Confirmation Statement, transaction code **HRBEN0015**

Data:

Personnel number – 80001036

Questions/Results:

- After you have "printed" Jean's confirmation form, return back to the Print Confirmation Form screen and select one of her children. Then click the Overview button.
- 2. What screen is now displayed?
- 3. Which of the previous SAP transactions that we have covered also allows you to print a confirmation form?

Notes:

4.2 - Walkthrough



- Print Confirmation Form HRBEN0006
 - In this exercise, Jean Leach needs a printed confirmation form detailing her benefit selections for her financial planner. She does not have access to ESS so she needs you to print the benefits overview for her.
- Instructions
 - Use the HRBEN0006 (Participation Overview) transaction to display a copy of her plan.

Important: The training classroom is not set up to print, so for this exercise, select the display form option instead of the print option.



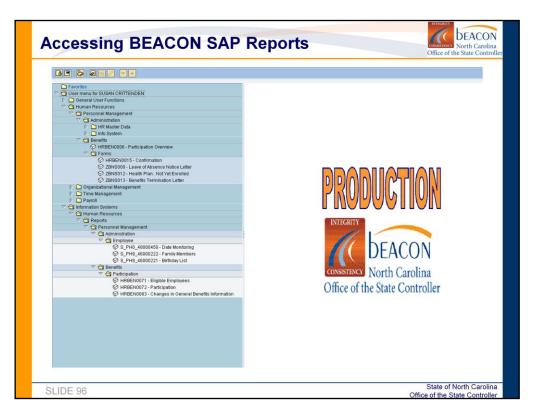
SLIDE 95

State of North Carolina

Data:

Personnel number - 80001036

Notes:



The BEACON SAP reports are accessed via the SAP Easy Access screen, or by using the applicable transaction code. The reports are categorized according to employee, organizational management, documents, administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.



When you have entered all of the selection criteria, click the **Execute** button to run the report.

Sometimes when you are running a report, or performing other transactions, the system may seem to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.

Notes:

Print	a Health Plan: No	t Yet Enroll	ed Letter	DEACON North Carolina Office of the State Controlle
_	Health Plan: Not Yet Enrol	led		
	Reminder Dates Personnel Area Personnel Subarea Org Unit Employee Number Num of Days before Expiration	06/19/2008 🕏	to 06/26/2008 to to to to to	• • • • •
SLIDE 9	8		0	State of North Carolina ffice of the State Controller

The Health Plan: Not Yet Enrolled Letter can be used to identify employees that have not selected a health plan during the new hire event. The letter is also used to communicate to the employee that they have not selected a health plan during a new hire event. The transaction should be run weekly by Agency Benefits Specialists.

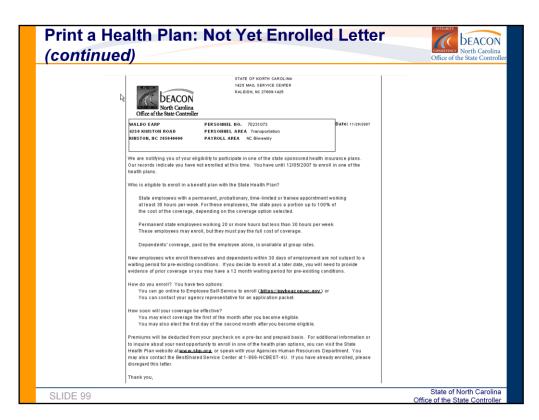
Use SAP transaction code **ZBNS012** to print a Health Plan: Not Yet Enrolled Letter.

Displayed is an example of the initial screen utilized before printing a Health Plan: Not Yet Enrolled Letter.

Many variables are available when generating a Health Plan: Not Yet Enrolled Letter:

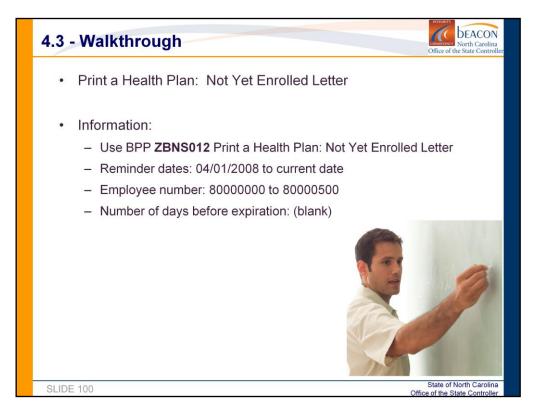
- Reminder Dates
- Personnel Area
- Personnel Subarea
- Org unit (Organizational unit)
- Employee Number (Personnel Number)
- · Number of days before Expiration

It is possible to populate all of the above fields with a list or range of numbers, but it is preferred to use the defaulted Remainder Dates and the defaulted Number of Days before Expiration fields.



This is an example of a Letter informing an employee that he/she has not yet enrolled in a health plan.

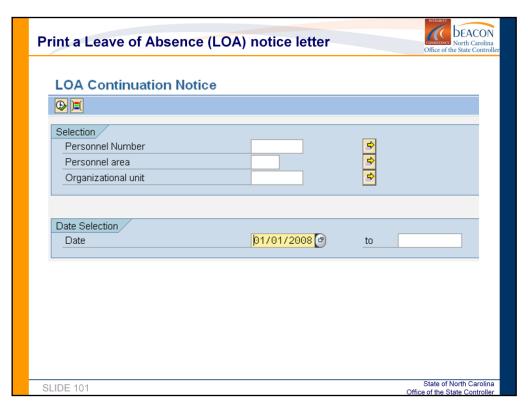
Notes:



Watch as the Instructor demonstrates how to access the Print a Health Plan: Not Yet Enrolled Letter using the **ZBNS012** transaction. The **ZBNS012** transaction allows you to preview the letter online or print it locally.

- 1. Select as many people as you want from the list of employees.
- 2. Click on the Letter Icon.
- 3. Open a print preview.
- 4. Explore next page and previous page functions.

Notes:



This transaction is used to provide the LOA letter for all employees on a LOA for the selected period. The transaction should be run weekly by Agency Benefits Specialists.

Use SAP transaction code **ZBNS008** to print a Leave of Absence (LOA) notice letter.

Displayed is an example of the initial screen utilized before printing a Leave of Absence (LOA) notice letter.

It is a simple report screen requiring the input of:

- A Personnel number, a list of Personnel numbers, or a range of Personnel numbers.
- · A Start Date and an End Date.
- The dates used in the Date Selection area will identify employees whose LOA Start Date are in the range entered.

SUGDY	STATE OF NORTH CAROLINA 1425 MAIL SERVICE CENTER		
DEACON North Carolina Office of the State Controller	RALEIGH, NC 27699-1426		
Cont	tinuation of Benefits During Leave of Abs	sence	
Cassie Shackleford	Personnel IIo. 00000131	DATE 12/06/2007	
3456 Bush St Raleigh, HC 27607	Personnel Area Transportation Payroll Area NC Biweekly		
pay continues in full during my leave of am notifying you of my intent to cont	enefits during Leave of Absence Notice and have reviewe of absence, my benefits will continue without interruption. linue or stop the following benefit plans during the time my end payments to vendor addresses provided by the due di	leave of absence is without pay. I	
Center, Raleigh, NC 27699-1425 by t premiums owed with my agency repre	will send the premiums directly to the BEST Shared Servi he last day of each month. If I become eligible for short-to esentative. efit plan, sign and date the form. Send forms to BEST Ser	ice Center at 1425 Mail Service erm disability, I will coordinate any	
Center, Raleigh, NC 27699-1425 by t premiums owed with my agency repre-	will send the premiums directly to the BEST Shared Servi he last day of each month. If I become eligible for short-to esentative. efit plan, sign and date the form. Send forms to BEST Ser	ice Center at 1425 Mail Service erm disability, I will coordinate any rvice Center at 1425 Mail Service	
Center, Raleigh, NC 27899-1425 by t premiums owed with my egency repre- Please place an "X" next to each ben- Center, Raleigh, NC 27699-1425 or si	will send the preniums directly to the BEST Shared Servi he list day of each month. If I become eligible for short-te sendative. elif plan, sign and date the form. Send forms to BEST Ser ax the torm to 919-855-8861.	ice Center at 1425 Mail Service errer disability, I will coordinate any vicice Center at 1425 Mail Service ING LOA	
Center, Raleigh, No. 27698-1425 by t premiums owed with my agency repr Please pisce an "X" next to each ben Center, Raleigh, No. 27699-1425 or to PLAN	will send the preniums directly to the EST Shared Servi- helat day of each month. If I become eligible for short-ti- secretative. etit plan, sign and date the form. Send forms to BEST Ser av. the form to 919-95-6861. ELECTION DUR. i elect to continue for Set only Set openeism(s) Sop Participation	ice Center, at 1425 Mail Service arm disability, I will coordinate any vice Center at 1425 Mail Service ING LOA	
Center, Riselegh, NC 27989-1425 by premium owed with my agency repre- Please pince an "X" need to each ben- Center , Riselegh , NC 27989-1425 or h PLAN Indemnity Plan	will send the preniums directly to the EST Shared Service histadies of each month. If I become eligible for short-tile scentrative. etit plan, sign and date the form. Send forms to BEST Ser ax the form to 919-955-8861. ELECTION DUR. elect to continue for	ico Center, et 1425 Mail Service erre disability, I will coordinate any vice Center at 1425 Mail Service ING LOA Coverage	

Once the transaction is executed, the letter can be displayed and printed. Pictured is an example of the LOA letter generated.

Notes:



Purpose of Printing a Benefits Termination Letter

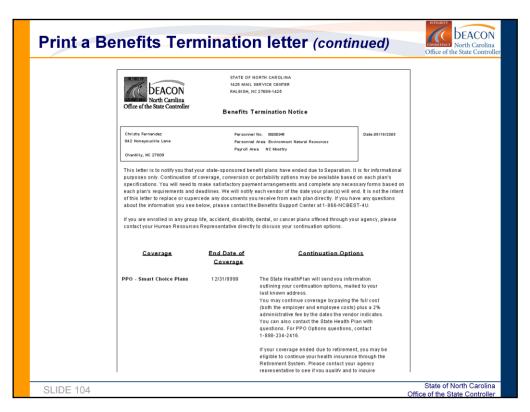
This transaction generates a letter that can be provided to terminated employees outlining their continued options for benefits after employment ends. The transaction should be run weekly by the Agency Benefits Specialists.

Use SAP transaction code **ZBNS013** to print a Benefits Termination letter.

Many variables are available when generating Benefits Termination letters including:

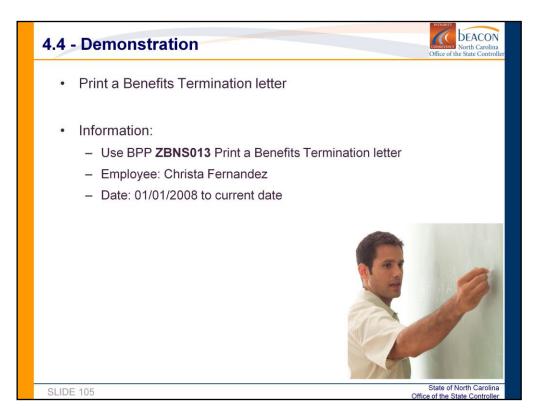
- Personnel Number
- Employment status
- Personnel area
- Personnel subarea
- Employee group
- Employee subgroup
- Organizational unit
- Start Date and End Date
 - The dates used in the Date Selection area will identify employees whose Benefits Termination date are in the range entered.

Notes:



Once the report is executed, the letter can be displayed and printed.

This is an example of a letter informing employees that their benefit participation in an enrollment program has been terminated. Notes:

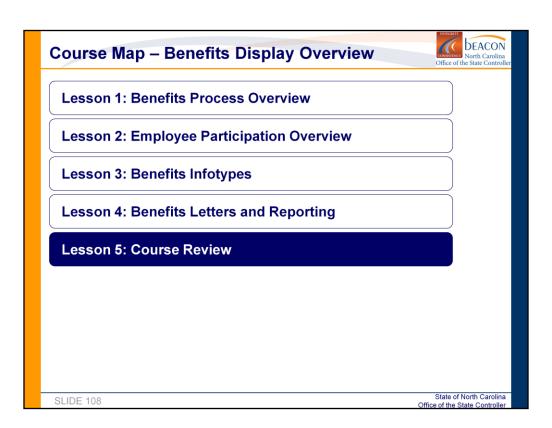


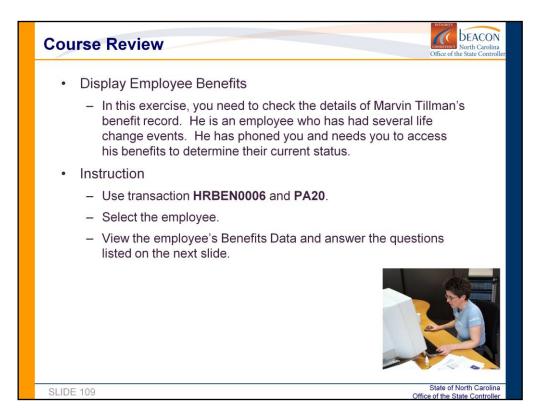
Watch as the Instructor demonstrates how to access Print a Benefits Termination letter using the **ZBNS013** transaction. The **ZBNS013** transaction allows you to preview the letter online or print it locally.

Notes:









Course Review: Display Employee Benefits Scenario:

You need to check the details of an employee's benefit record.

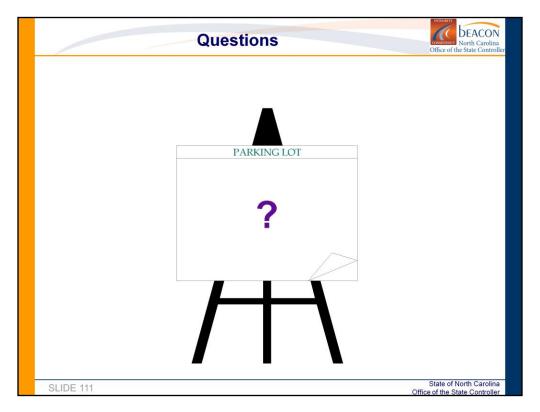
Work Instruction #: Participation Overview, transaction code **HRBEN0006** and **PA20** Display HR Master Data

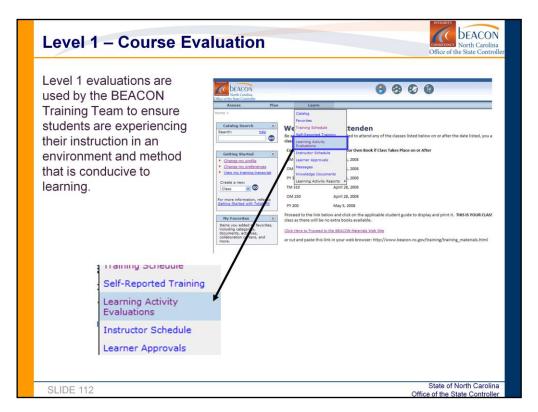
Instructions:

- 1. Use transaction code HRBEN0006 and PA20.
- 2. Select the employee, **Tillman**
- 3. Redo the search by entering both the first and last name
- 4. View the employee's Benefits Data and answer the questions listed in the following slides.

Notes:

Course Review	DEACON ORIGINATI North Carolina Office of the State Controlle
Questions	Answer
What is the effective date of almost all of Marvin's benefits?	
How many family members or dependents does Marvin have in BEACON? Where did you go to find the answer?	
Who are his family members?	
How much is Marvin contributing for his pre-tax Health Care FSA?	
Where can you find Marvin's SSN and what is it?	
What is the effective date of his Retirement enrollment?	
Why is his retirement enrollment date different than the rest of his benefits?	
What special indicators are listed on Marvin Tillman Jr's record?	
How many adjustment reasons are included in Marvin's record?	
SLIDE 110	State of North Carolina Office of the State Controller





Level 1 Evaluations

The Level 1 evaluation for 100 and 200 level classes is accessed as shown above (Learner Home Page > Learn > Learning Activity Evaluations).

Ask your instructor if you have any difficulty accessing the course evaluation.

Notes:

Next Steps



- Monitor BEACON communication
 - BEST Shared Services web site (especially the Updates tab)
 - URL: http://www.ncosc.net/BEST/
- Review conceptual materials
- Access BEACON Help
 - Access from an SAP transaction
 - URL: http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
 - URL: https://mybeacon.nc.gov
 - Client 899
 - Use your current NCID user name and password



SLIDE 113

ffice of the State Controller

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

Notes:



To help determine the effectiveness of the training, please complete an online Evaluation form. Your feedback is an important part of continuing to improve the effectiveness of the HR training courses.

Notes:

Reference #	Transaction	Description	Туре	Page #
2.1 2.2	HRBEN0006	Display Participation Overview (General Overview of Benefits Plan Data screen)	D E	46 52
2.3	PA20	Display Employee Benefits Data	E	53
3.1 3.2	PA20	Display Employee Benefits Data – Family Members	D E	63 67
3.3 3.4	PA20	Display Employee Benefits Data - Health Plans	D E	68 74
3.5	PA20	Display Insurance Plans	Е	80
3.6	PA20	Display Employee Benefits Data - Insurance Plans	E	86
3.7	PA20	Display Family Member Dependents	Е	87
4.1	HRBEN0015	Print Confirmation Form	E	96
4.2	HRBEN0006	Print Confirmation Form	Е	97
4.3	ZBNS012	Print a Not Yet Enrolled Letter Report	E	102
4.4	ZBNS013	Print a Benefits Termination Letter	D	107
CR	HRBEN0006	Course Review	Е	111

How many family members or dependents does Marvin have in BEACON? Where did you go to find the answer? Who are his family members? O How much is Marvin contributing for his pre-tax Health Care	Feb 1 4 Master Data tab Cynthia, Marvin Jr, Charles, Tiffany
in BEACON? Where did you go to find the answer? Who are his family members? One of the answer? Who are his family members? One of the answer?	Master Data tab Cynthia, Marvin Jr,
Who are his family members? () How much is Marvin contributing for his pre-tax Health Care	Cynthia, Marvin Jr,
How much is Marvin contributing for his pre-tax Health Care	
	Charles, Tiffany
,	
	\$125
Where can you find Marvin's SSN and what is it?	Master Data tab
4	402-39-3695
What is the effective date of his Retirement enrollment?	01/01/08
in the first series of the first series and the fir	Retirement enrollment begins the month of hire
What special indicators are listed on Marvin Tillman Jr's	Disability
record?	